



PERS-BENEFIT ANALYST TRAINEE

Characteristics of Work

This is professional and technical work involving the responsibility for assisting PERS-Benefit Analysts in a higher classification. The work is always subject to close supervision of experienced Branch/Division Director. Questions involving important decisions are referred to a superior. No supervision is exercised at this level.

Examples of Work

Examples of work performed in this classification include, but are not limited to, the following:

Provides information regarding specific statutory provisions, rules, and regulations governing benefits available to members and beneficiaries under various retirement plans and payment options.

Assists members and agency personnel in completing and filing claims for service, disability, and for survivor benefits.

Assists in researching, compiling, analyzing, and interpreting important detailed, often complex employment, wage, and contribution, and service credit records for determination of service eligibility and calculation of benefit amounts.

Maintains regular contact with persons in other departments or other agencies to coordinate claims processing requirements, to resolve problems, to furnish or obtain information, and to explain retirement benefit rules and regulations.

Assists in calculating benefit payment amounts, projecting wages and service credits for future retirees being processed to the retiree payroll.

Assists in auditing and reconciling member wages, contribution, and service credit reporting for all periods of employment of each member captured in the computer database.

Assists in collecting, maintaining, tabulating, and evaluating statistical report data for special programs or planning initiatives.

Assists in calculating costs of additional service credits such as out-of-state and professional leave for payment by members before retirement.

Assists in providing information to members for service enrollment with the Deferred Compensation Plan and Institution of Higher Learning Optional Requirement Plan.

Prepares assigned department payroll for funding categories.

Reconciles, balances, and audits various accounts.

Performs related or similar duties as required or assigned.

Essential Functions

Additional essential functions may be identified and included by the hiring agency. The essential functions include, but are not limited to, the following:

1. Assists PERS-Benefit Analysts providing information to individual members and member agency personnel regarding benefits.
2. Assists in the calculation of projected estimates of benefits and final benefit payments in a timely manner.

Essential Competencies

The following underlying competencies are linked to the essential functions of the job. Employees in this position may be evaluated on these competencies as part of the performance appraisal system. Specific behaviors may be identified and included later by the hiring agency. Failure of an employee to successfully demonstrate some or all of these competencies, as deemed important by his or her reporting official, may result in the employee being placed on a performance improvement plan. If after a reasonable period of time, usually three (3) months, the employee fails to demonstrate successful performance, the employee may be terminated. These competencies include, but are not limited to, the following:

General Public Sector Competencies

Integrity and Honesty: Models and demonstrates high standards of integrity, trust, openness, and respect for others. Demonstrates a sense of responsibility and commitment to the public trust through statements and actions. Demonstrates integrity by honoring commitments and promises. Demonstrates integrity by maintaining necessary confidentiality.

Work Ethic: Conscientiously abides by the rules, regulations, and procedures governing work. Exhibits a strong work ethic by being productive, diligent, conscientious, timely, and loyal.

Service Orientation: Seeks to understand and meets and/or exceeds the needs and expectations of customers. Treats customers with respect, responding to requests in a professional manner, even in difficult circumstances. Provides accurate and timely service. Develops positive relationships with customers. Demonstrates a commitment to quality public service through statements and actions.

Accountability: Is productive and carries fair share of the workload. Accepts responsibility for actions and results. Focuses on quality and expends the necessary time and effort to achieve goals. Demonstrates loyalty to the job and the agency and is a good steward of state assets. Steadfastly persists in overcoming obstacles and pushes self for results. Maintains necessary attention to detail to achieve high level performance. Deals effectively with pressure and recovers quickly from setbacks. Takes ownership of tasks, performance standards, and mistakes. Has knowledge of how to perform one's job. Knows the organization's mission and functions and how it fits into state government.

Self Management Skills: Encourages and facilitates cooperation, pride, trust, and group identity; fosters commitment and team spirit; works effectively and cooperatively with others to achieve goals. Maintains a positive attitude. Effectively manages emotions and impulses. Treats all people with respect, courtesy, and consideration. Communicates effectively. Remains open to new ideas and approaches. Avoids conflicts of interest. Promotes cooperation and teamwork.

Interpersonal Skills: Shows understanding, courtesy, tact, empathy, and concern; develops and maintains relationships. Demonstrates cross cultural sensitivity and understanding. Identifies and seeks to solve problems and prevent or resolve conflict situations. Encourages others through positive reinforcement.

Communication Skills: Receives, attends to, interprets, and responds to verbal messages and other cues such as body language in ways that are appropriate to listeners and situations. Expresses information to individuals or groups effectively, taking into account the audience and nature of the information; listens to others, attends to nonverbal cues, and responds appropriately. May make oral presentations. Communicates ideas, suggestions, and concerns as well as outcomes and progress throughout the process of an activity. Provides thorough and accurate information.

Self-Development: Seeks efficient learning techniques to acquire and apply new knowledge and skills; uses training, feedback, or other opportunities for self-learning and development. Develops and enhances skills to adapt to changing organizational needs. Remains open to change and new information and ideas; adapts behavior or work methods in response to new information, changing conditions, or unexpected obstacles.

Technical Competencies

Communication Skills: Concisely and correctly answers questions and/or explains or conveys information to the membership, agencies, management, and other entities. Asks appropriate questions to gain information needed to assist the membership or to provide information to the membership, agency personnel, or other entities. Participates effectively in meetings, seminars, and training sessions. Presents oral and written information internally or externally using proper grammar, punctuation, and content. Appropriately documents information using tools such as: Notes, letters, e-mails, reports, memorandums, etc. Presents facts or information to a group in written and/or oral form such as speaking to groups or providing necessary supporting documents. Communicates information in a courteous manner without invoking anger.

Workflow Management: Schedules and manages workload to achieve goals. Works independently resolving all tasks timely. Researches and finds solutions using all available informational resources. Effectively utilizes resources such as time, computer equipment, travel expense reimbursement, supplies, etc. Makes appropriate choices or exercises sound judgment for a variety of circumstances. Exercises appropriate level of professional skepticism based on information obtained. Adapts appropriately to a variety of situations and surroundings

Functional Capability: Possesses knowledge of retirement laws, regulations, and policies. Possesses knowledge of plans and programs that are administered by the agency. Assists agency personnel with answers to complex questions within area of expertise. Develops and/or leads training efforts of agency personnel or other entities. Ability to think analytically and exercise an analytical thinking process. Works with and is comfortable with calculations and computations.

Professional Maturity: Able to assess the situation and appropriately respond.

Exhibits the attributes of confidence, assertion, tolerance, patience, and empathy at the appropriate time. Manages conflicts and defuses situations. Knows when to refer an issue to the appropriate level. Aligns personal behavior with agency standards. Continuously assesses work unit for areas of improvements and suggests changes for continuous improvement. Responds appropriately to supervision and administrative decisions. Is able to work under and with authority and accepts decisions. Takes initiative to accomplish stated goals. Maintains appropriate standards of confidentiality and only provides information within authority to provide.

Work Performance: Provides information regarding specific statutory provisions, rules, and regulations governing benefits available to members and beneficiaries under various retirement plans and payment options. Assists members and agency personnel in completing and filing claims for service, disability, and for survivor benefits. Researches, compiles, analyzes, and interprets important detailed, often complex employment and wage and contribution records for determination of service credit eligibility and calculation of benefit amounts. Maintains regular contact with persons in other departments or other agencies to coordinate claims processing requirements, to resolve problems, to furnish or obtain information and to explain retirement benefit rules and regulations. Provides information to members for service enrollment with the Deferred Compensation Plan and Institution of Higher Learning Optional Requirement Plan. Calculates benefit payment amounts, projecting wages and service credits for future retirees being processed to the retiree payroll. Audits and reconciles member wage and contribution reporting for all periods of employment of each member as captured in the computer data base. Collects, maintains, tabulates, and evaluates statistical report data for special programs or planning initiatives. Calculates cost of additional service credit such as out of state and professional leave for payment by members before retirement.

Mentoring or Training: Mentors or otherwise assists co-workers as assigned helping them to improve their knowledge, skills, and abilities. Fosters a positive attitude.

Technical: Proficient in using computer hardware and software to complete assigned tasks, meet agency goals, and produce required products. Possesses knowledge of Microsoft products which could include but is not limited to the following: Windows, Word, Excel, and PowerPoint.

Minimum Qualifications

These minimum qualifications have been agreed upon by Subject Matter Experts (SMEs) in this job class and are based upon a job analysis and the essential functions. However, if a candidate believes he/she is qualified for the job although he/she does not have the minimum qualifications set forth below, he/she may request special consideration through substitution of related education and experience, demonstrating the ability to perform the essential functions of the position. Any request to substitute related education or experience for minimum qualifications must be addressed to the State Personnel Board in writing, identifying the related education and experience which demonstrates the candidate's ability to perform all essential functions of the position.

Physical Requirements: These physical requirements are not exhaustive, and additional job related physical requirements may be added to these by individual agencies on an as needed basis. Corrective devices may be used to meet physical requirements. These are typical requirements; however, reasonable accommodations may be possible.

Light Work: May frequently walk or stand and/or frequently exert force equivalent to lifting up to approximately 10 pounds and/or occasionally exert force equivalent to lifting up to approximately 20 pounds.

Vision: Requires the ability to perceive the nature of objects by the eye.

Near Acuity: Clarity of vision at 20 inches or less.

Midrange: Clarity of vision at distances of more than 20 inches and less than 20 feet.

Far Acuity: Clarity of vision at 20 feet or more.

Accommodation: Ability to adjust focus.

Speaking/Hearing: Ability to give and receive information through speaking and listening skills.

Motor Coordination:

While performing the duties of this job, the incumbent is regularly required to sit; use hands to finger, handle or feel objects, tools or controls; and reach with hands and arms. The incumbent is occasionally required to stand; walk; climb or balance; and stoop, kneel, crouch, or bend.

Experience/Educational Requirements:

Education:

A Bachelor's Degree from an accredited four-year college or university.

OR

Education:

Graduation from a standard four-year high school or equivalent (GED).

AND

Experience:

Four (4) years of experience in work related to the above described duties.

Substitution Statement

Above graduation from a standard four-year high school or equivalent (GED), related education and related experience may be substituted on an equal basis.

Interview Requirements

Any candidate who is called to an agency for an interview must notify the interviewing agency in writing of any reasonable accommodation needed prior to the date of the interview.